

Customer Services Directions

Client Meeting
29 October 1993
London

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Customer Services Directions

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Customer Services Directions

**Client Meeting
29th October 1993
London**

Customer Services Directions

Agenda

- Market signposts
- Environmental services
- Business services

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Notes

Market Forecast Customer Services Market, 1993-1998

- Open versus closed
- Competition
- Service types

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Notes

Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
Proprietary (Closed)	1.8	1.5	-4
Open (Potentially)	1.4	2.2	9

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Notes

Trends in Open Services

- Actual versus potential
- Project management
- Effects of networking
- Third-party software
- Towards the desktop

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Notes

Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
Single-platform	2.2	1.7	-5
Multi-platform	1.0	2.0	15

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Notes

Software Support Trends

- Integration with hardware
- Applications grow in importance
- Response centre versus outsourcing
- Tools

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Notes

Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
System Vendors	1.8	2.0	3
Other Vendors	1.4	1.7	4

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Notes

Leading U.K. CS Vendors

Revenues	1992 (£ M)		Rank	
Vendor	CS	Other	1992	1991
ICL	381	185	1	3
Digital	278	137	2	2
IBM	265	183	3	1
HP	122	7	4	4
Unisys	98	18	5	5

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Notes

Leading U.K. CS Vendors

Revenues	1992 (£ M)		Rank	
Vendor	CS	Other	1992	1991
Granada	93	19	6	7
Bull	82	19	7	10
AT&T/NCR	67	40	8	8
Olivetti	53	8	9	9
Prime (CV)	46	21	10	6

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Notes

Types of Competition

- IMOs “time warp”
- Channels —————>Partners
- Independents on parallel course
- Building services

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Notes

Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
Support Services - Operational	2.0	2.2	1.9
Implementation Services - Project based	1.2	1.5	5.5

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Notes

Trends in Service Cultures

- Life cycle marketing needs project managers
- Reskilling selves and customers
- Support/Training synergy
- Projects —————→ Contracts

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Notes

Customer Services United Kingdom

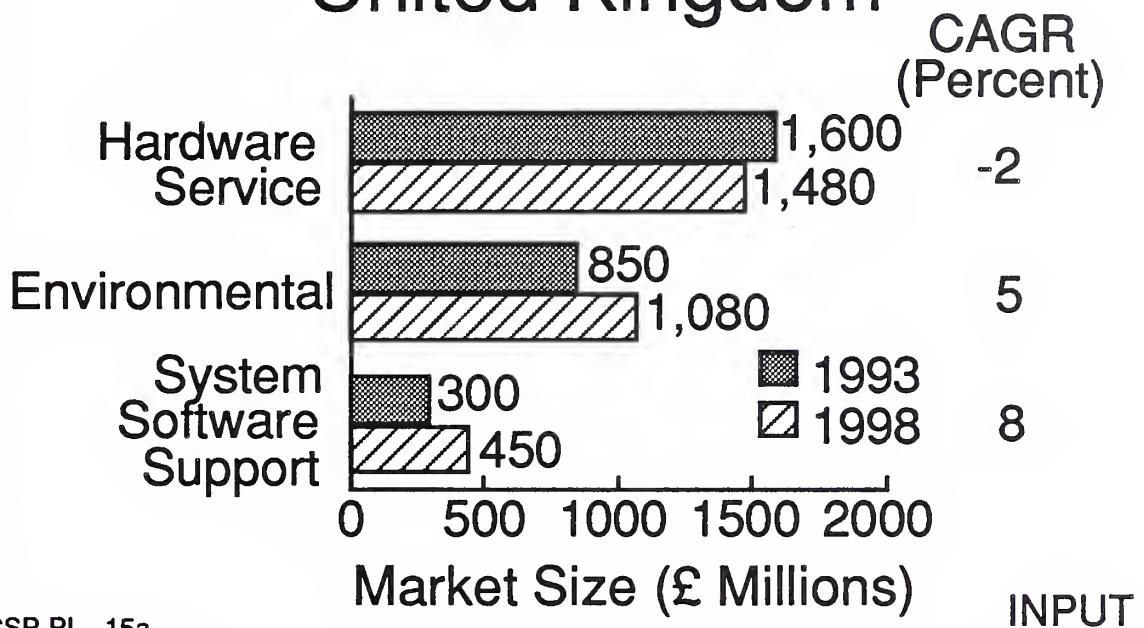
Platform	£ Billion		CAGR (Percent)
	1993	1998	
Networks	0.6	0.8	4
PCs	0.9	1.2	6
Workstations/ Servers	0.7	1.1	9
Proprietary Hosts	0.9	0.6	-7
Desktop Services	0.2	0.4	22

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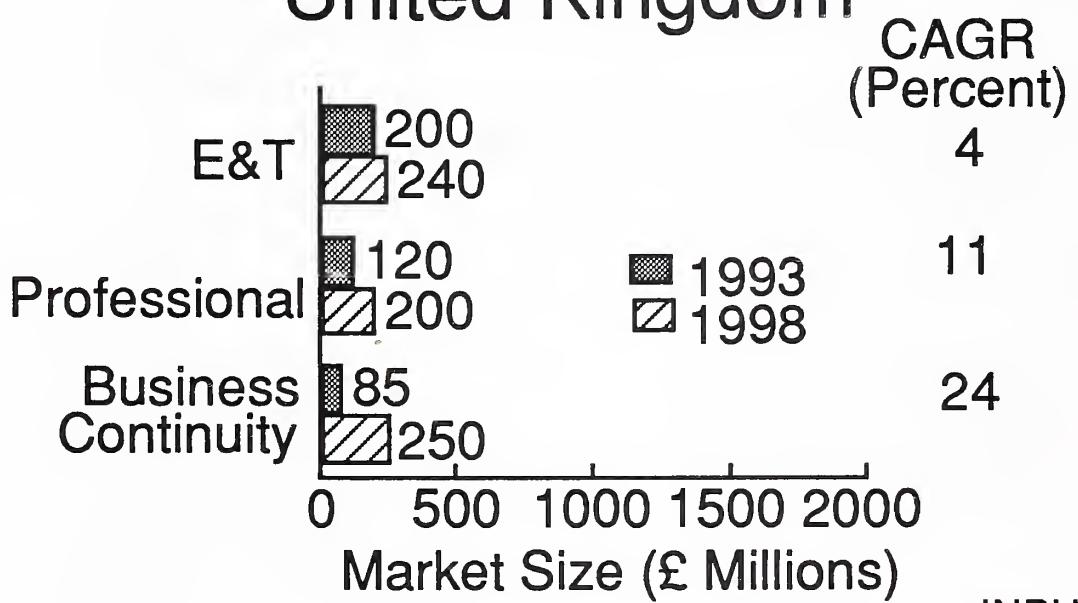
Notes

CS Sector Growth United Kingdom



Notes

CS Sector Growth United Kingdom



Notes

Environmental Services

From Cabling to Premises Management

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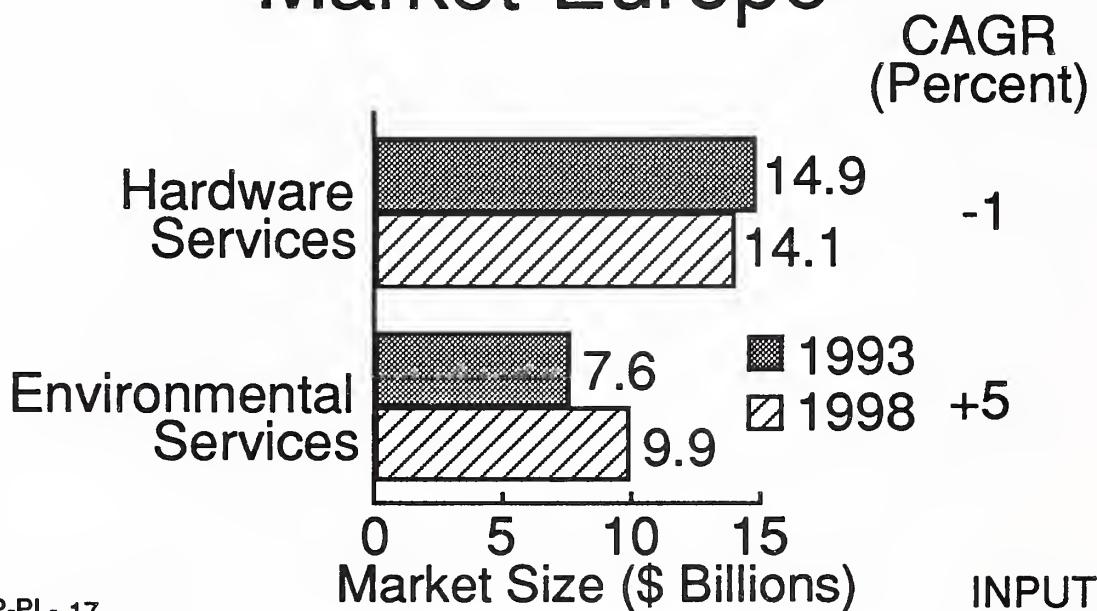
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Customer Services Market-Europe

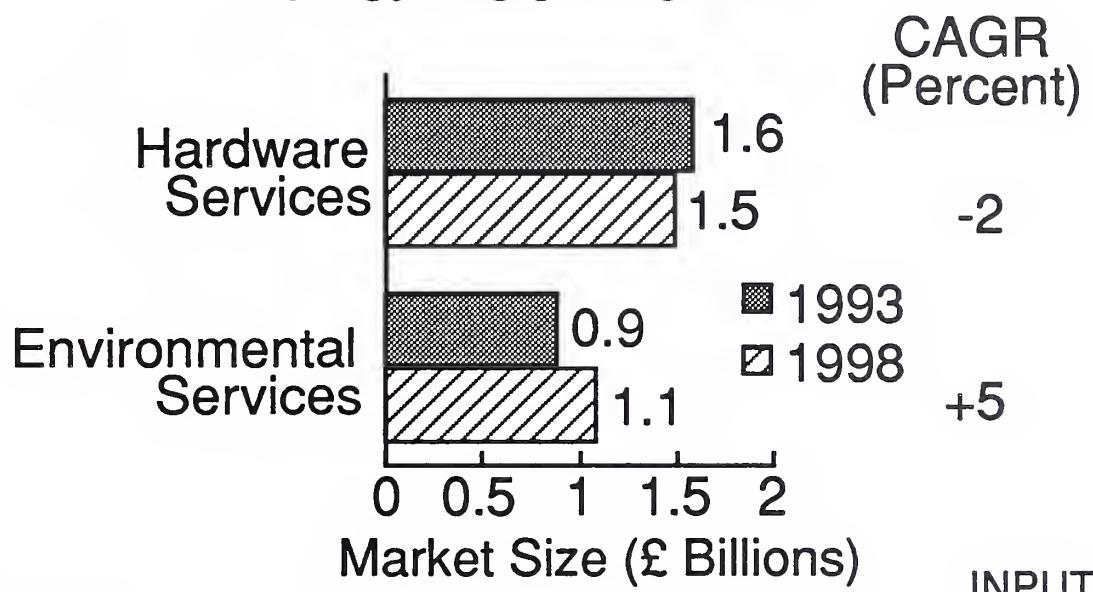


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Notes

Customer Services Market—U.K.

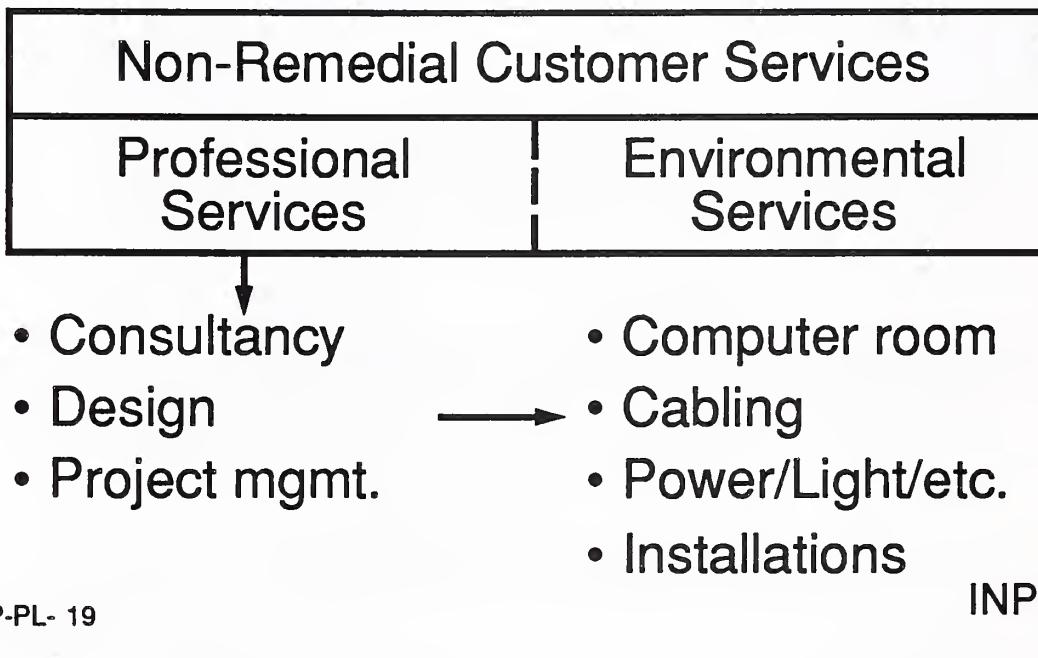


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Notes

Market Segmentation

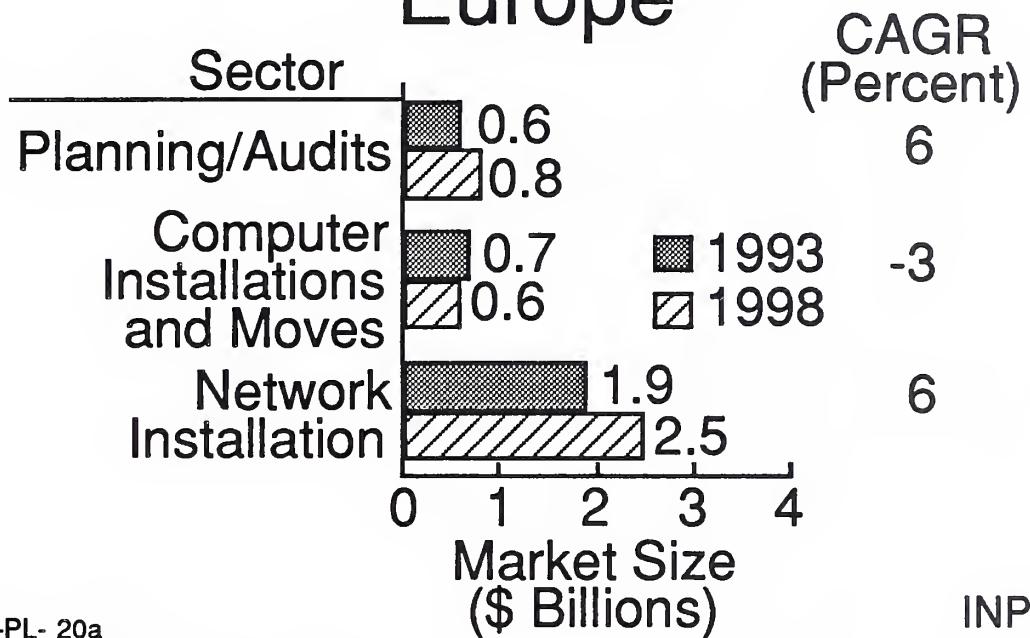


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Notes

- Environmental planning and audits
- Computer installations/de-installations/moves
- Network installations and upgrades
- Cabling services for voice, data and power
- Building integration services

Environmental Services Europe

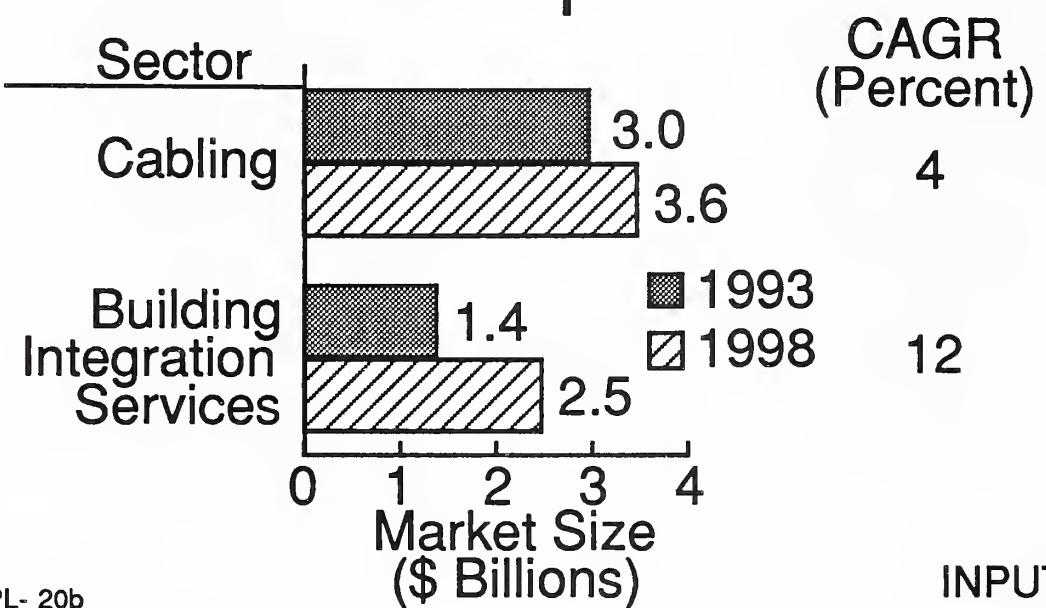


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Notes

Environmental Services Europe

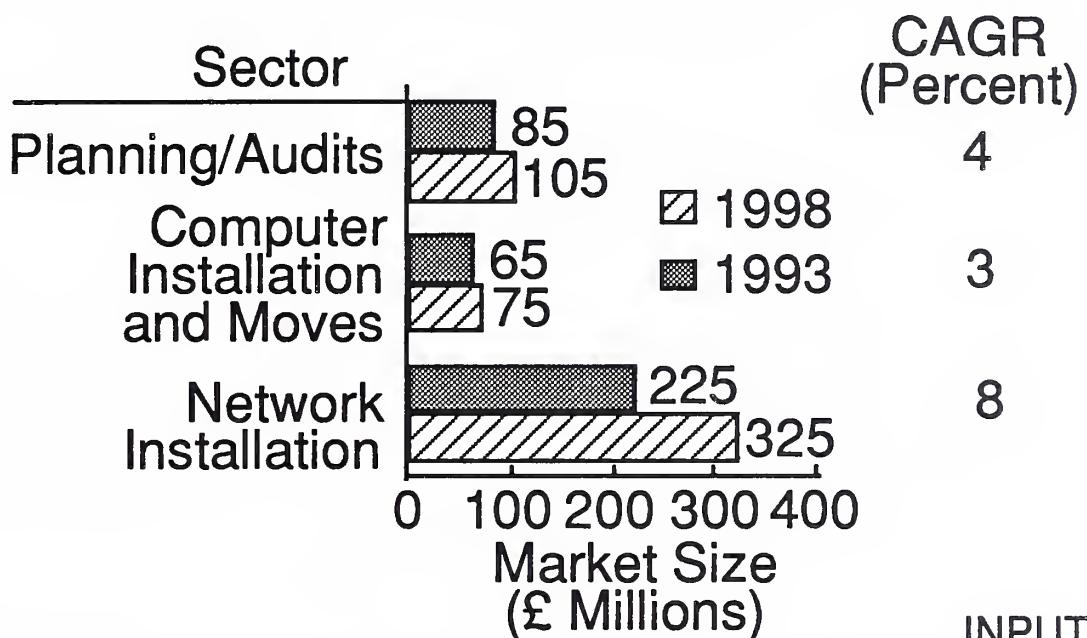


CSP-PL- 20b

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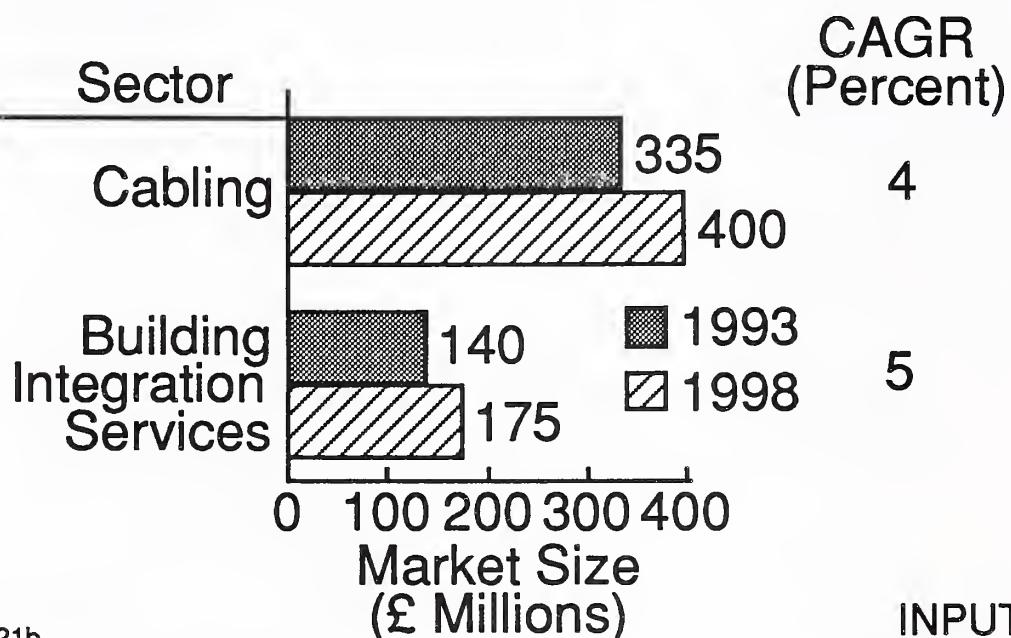
Environmental Services—U.K.



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Notes

Environmental Services—U.K.



CSP-PL- 21b

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Notes

Environmental Services Competition

New Entrants

- Telecommunication vendors

Suppliers

- Electrical contractors
- HVAC engineers

Buyers

- Property services
- Outsourcing vendors

Industry Competitors

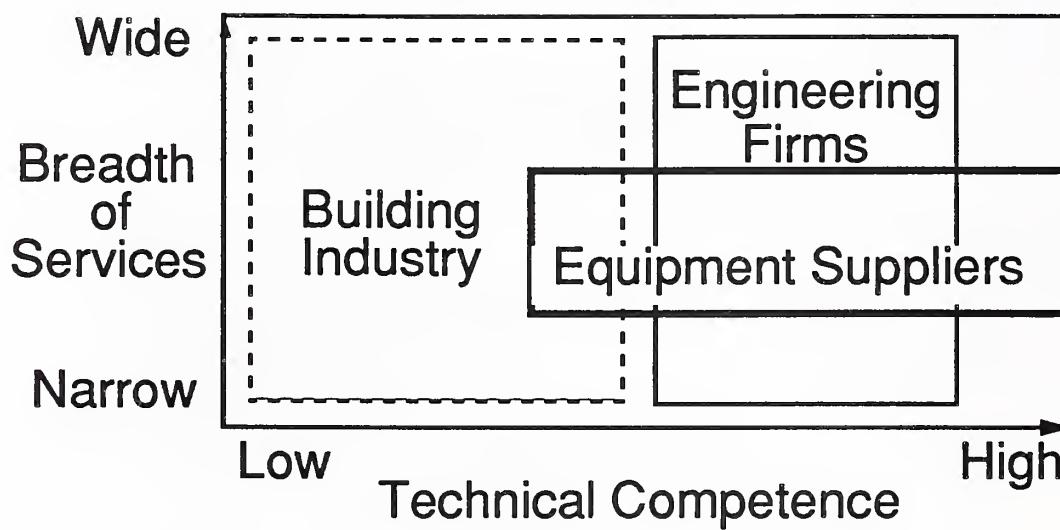
- Building & construction firms

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Notes

Vendor Positioning



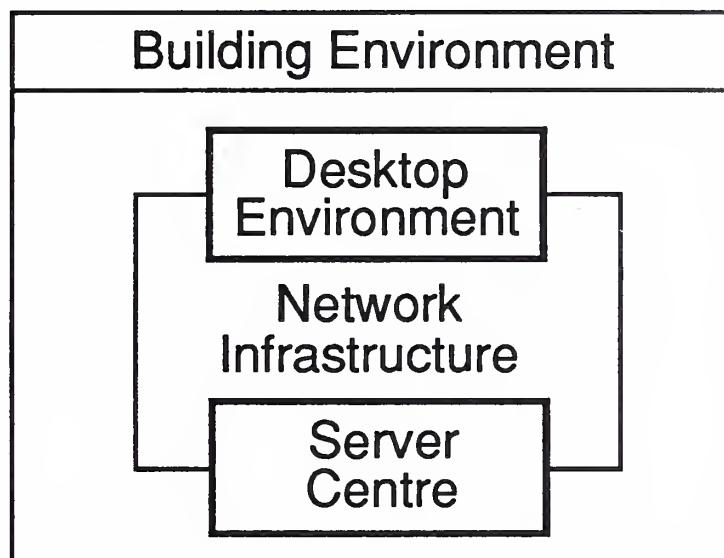
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Notes

Leading European Vendors

Vendor	Estimated Sector Revenues (\$M)	Market Share (Percent)
IBM	320	4.4
Digital	225	3.1
Unisys	130	1.8
Bull	105	1.5
SNI	95	1.3
ICL	75	1.0
Honeywell	65	0.9
HP	60	0.8
Olivetti	50	0.7
Getronics	40	0.6

Facilities Services

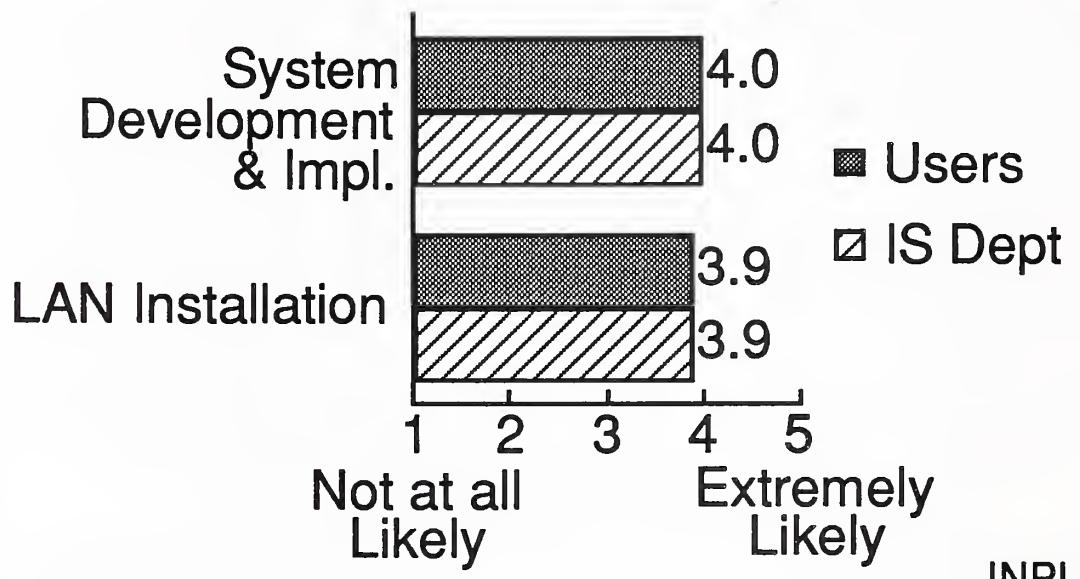


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Notes

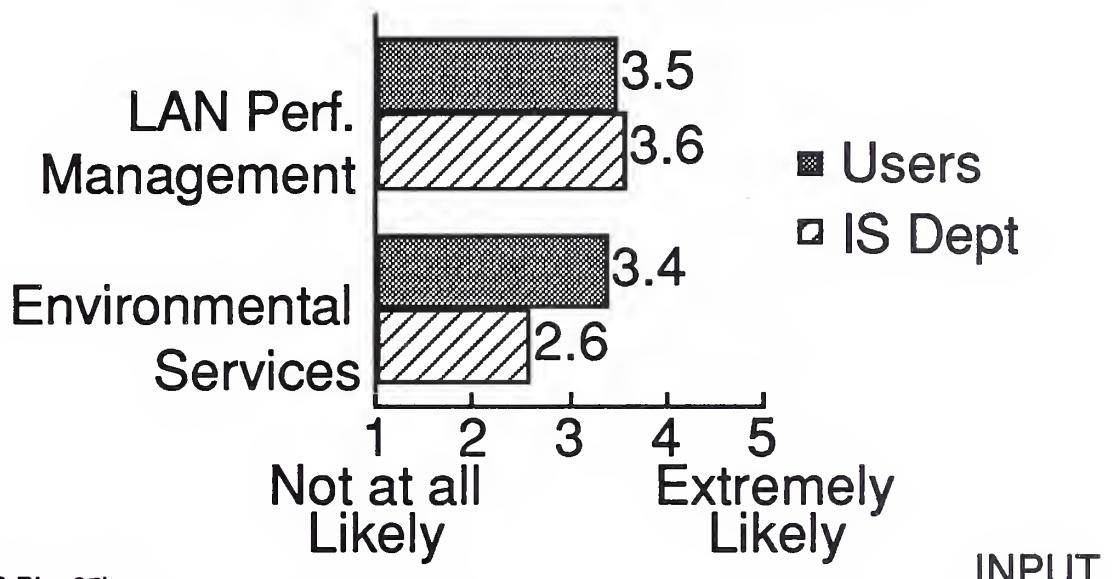
Principal Services Required Customer Perception



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Notes

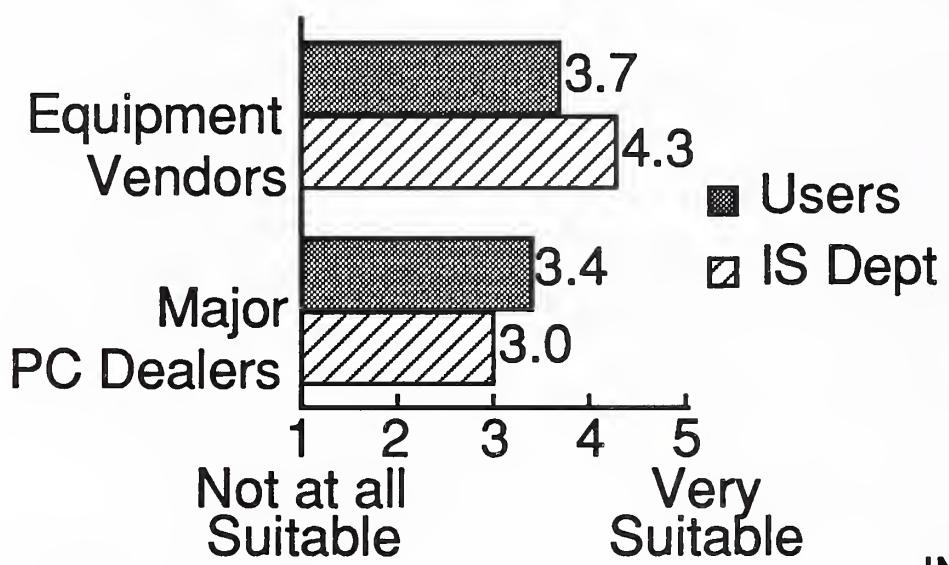
Principal Services Required Customer Perception



CSP-PL- 25b

Notes

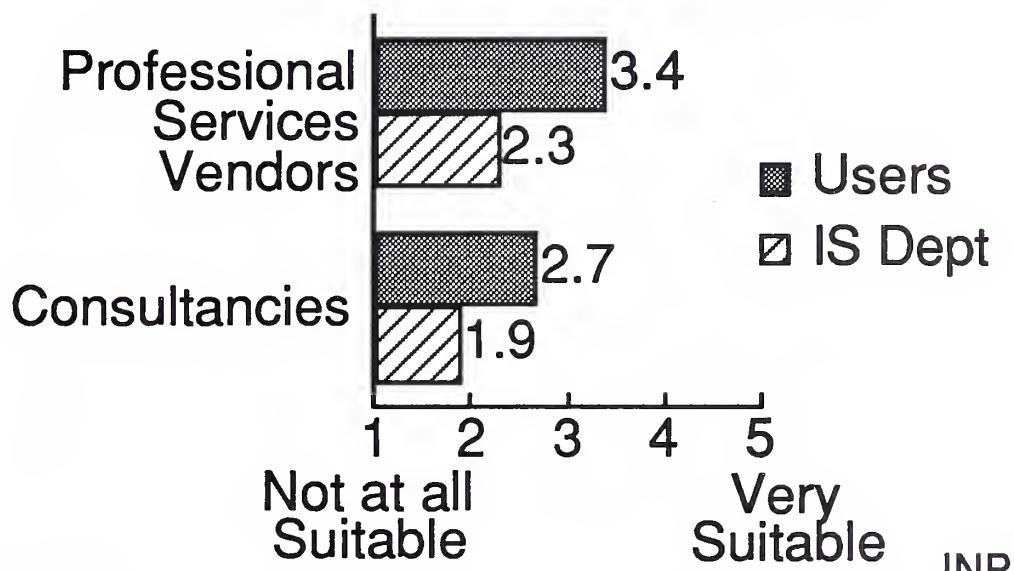
Vendor Suitability Customer Perception



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Notes

Vendor Suitability Customer Perception



CSP-PL- 26b

Notes

Business Services

A New Direction for Customer Services

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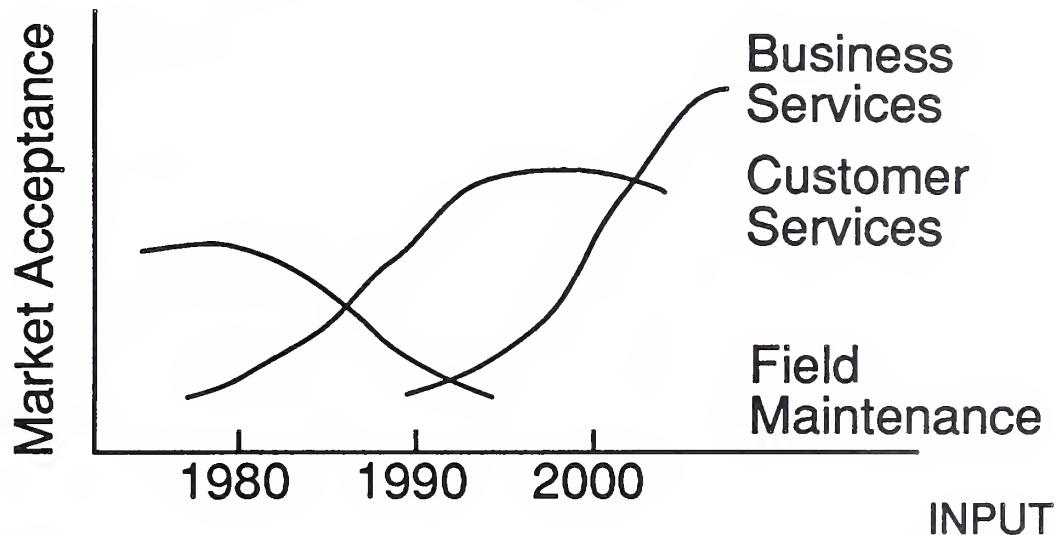
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Customer Services Market Waves



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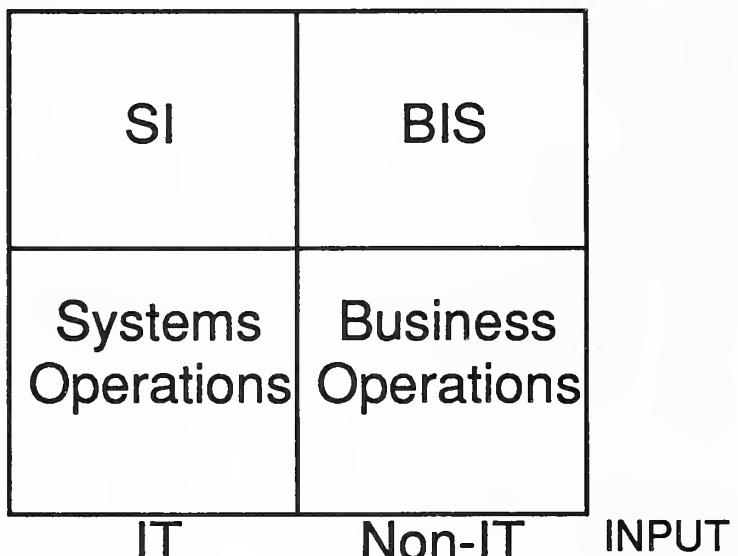
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Defining the Business Services Opportunity

Projects

Operations

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New Competitors

- BET FM
- Select FM
- P&O Total FM (Granada)
- Serco

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Notes

Other Competitive Firms

- Symonds FM
- Drake & Scull Technical Services
- MJN FM (Staveley Industries)
- Facilities & Property Management PLC
- IFM Co
- Procord (IBM buy out)
- Haden FM LTD.
- Airwork
- Thorn
- Hunting Engineering
- DASA
- CISET
- Thomson

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Serco

- Offering a comprehensive range of services within one contract
- IAL acquired April 1992
- £150 million annual revenue (1992)
- 6,000 plus staff

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Serco

- Facilities management (51%)
- Operation and maintenance (20%)
- System engineering (18%)
- Project management support (11%)

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Notes

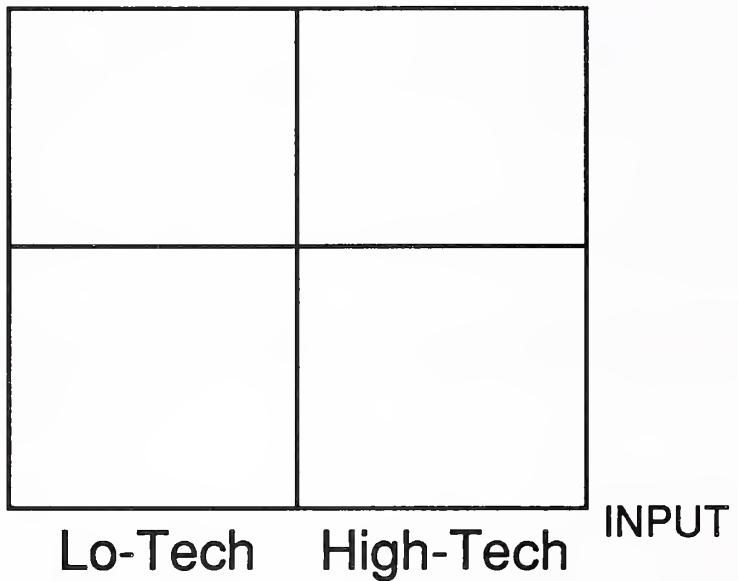
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Business Services Positioning

Projects

Operations

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Conclusions

- Strategic issue
 - Product support service or system support service
- Environmental services a step towards business services

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DATABASES

- Software and Services Market Forecasts
- Software and Services Vendors
- U.S. Federal Government
 - Procurement Plans (PAR)
 - Forecasts
 - Awards (FAIT)
- Commercial Application LEADS

CUSTOM PROJECTS

For Vendors—analyse:

- Market strategies
- Product/service opportunities
- Customer satisfaction levels
- Competitive position
- Acquisition targets

For Buyers—evaluate:

- Specific vendors
- Outsourcing options
- Market opportunities
- Systems plans
- Peer position

OTHER SERVICES

Presentations to user groups, planning meetings, etc.

Acquisition/partnership searches

Newsletters

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